

SEPTEMBER 2011

PROFILE ILLAWARRA



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State of the Region

Highlights

- » Coal production and employment at Southern Mines continued to grow during the year to June 2011.
- » The volume of trade activity at Port Kembla strengthened to record levels over the twelve months to June. Exports were up 9.0% to 19.8 Million tonnes and imports grew 8.5% to 14.0 Million tonnes.
- » Consumer confidence grew slightly during the three months to September 2011. The *Illawarra Consumer Sentiment Index* regained 2 pts to 79 pts overall, remaining well below the long term average.
- » The average yearly unemployment rate for the Illawarra SD was 6.6%, while youth unemployment worsened to an average of 15.1% for the year to June 2011.
- » There was a slight improvement in the volume of local jobs advertisements in the Saturday edition of the Illawarra Mercury. The total volume of ads grew 3.3% to 6,284 over the year to June. Full time job ads declined by 18.8% but ads for part time positions rose 88.4% from a low base.
- » Median property prices across the Wollongong Statistical District increased during the year to June. House prices were up 4.5% to \$437,000, medium density prices were up 2.2% to \$341,500 and the median land price strengthened by 11.0% to \$275,000.
- » There were less WSD property sales throughout the year to June. The volume of house sales fell 9.7% to 3,206, medium density property sales weakened by 22.5% and there were 411 land lot sales, down 21.9%.
- » The average number of rental listings in the Wollongong Statistical District increased during the June quarter, however there was a decline when looking at the annual figures.
- » The median advertised rental price increased by 8.3% for houses to \$390 and by 7.1% for units to \$300.
- » The number of residential dwelling approvals for the year to June throughout the ISD decreased by 9.3% to 1,678. House approvals fell 8.0% and medium density approvals declined by 11.7%.
- » Over the year to June, the number of visitors to the Wollongong SD increased and total tourist expenditure increased by 7.7% to \$701.1 Million.

Southern Mines Coal Production

Coal mining continued to grow throughout the southern region during the twelve months to June 2011:

- » The production of coal increased by 9.8% to 14.3 Million tonnes, up from 13.0 Million tonnes in the year to June 2010.
- » Average employment improved to 3,475 persons, a rise of 16.6%.
- » However, productivity weakened to 4.1 Thousand tonnes per employee, down 5.8%.

The quarterly results were also positive. For the June quarter:

- » There was a 26.2% recovery for adjusted coal production from the March quarter's weak 2.9 Million tonnes to 3.7 Million tonnes.
- » Productivity recorded a 23.4% improvement to 1.0 Thousand tonnes per person, while the number of employees grew 2.3% to 3,676.

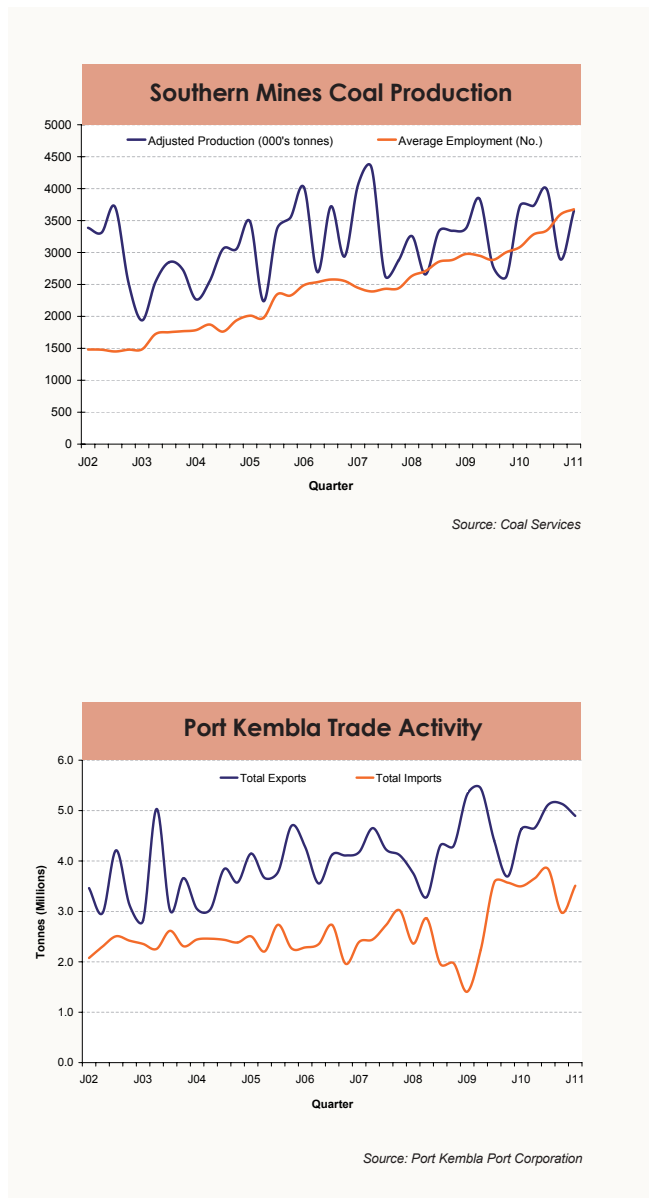
Port Kembla Trade

The volume of trade activity strengthened to record levels over the year to June 2011:

- » Export levels increased to 19.8 Million tonnes, up 9.0% on the 18.2 Million tonnes reported in the year to June 2010.
- » Import tonnage strengthened to 14.0 Million tonnes, growth of 8.5% from 12.9 Million tonnes in the previous year.
- » There was an improvement in overseas exports (up 11.7%) and overseas imports (up 6.7%).

The quarterly result showed a decline in export tonnage:

- » There was 4.9 Million tonnes of exports recorded, down 4.7% since the March quarter.
- » Imports increased by 17.9% from 3.0 Million tonnes to 3.5 Million tonnes.



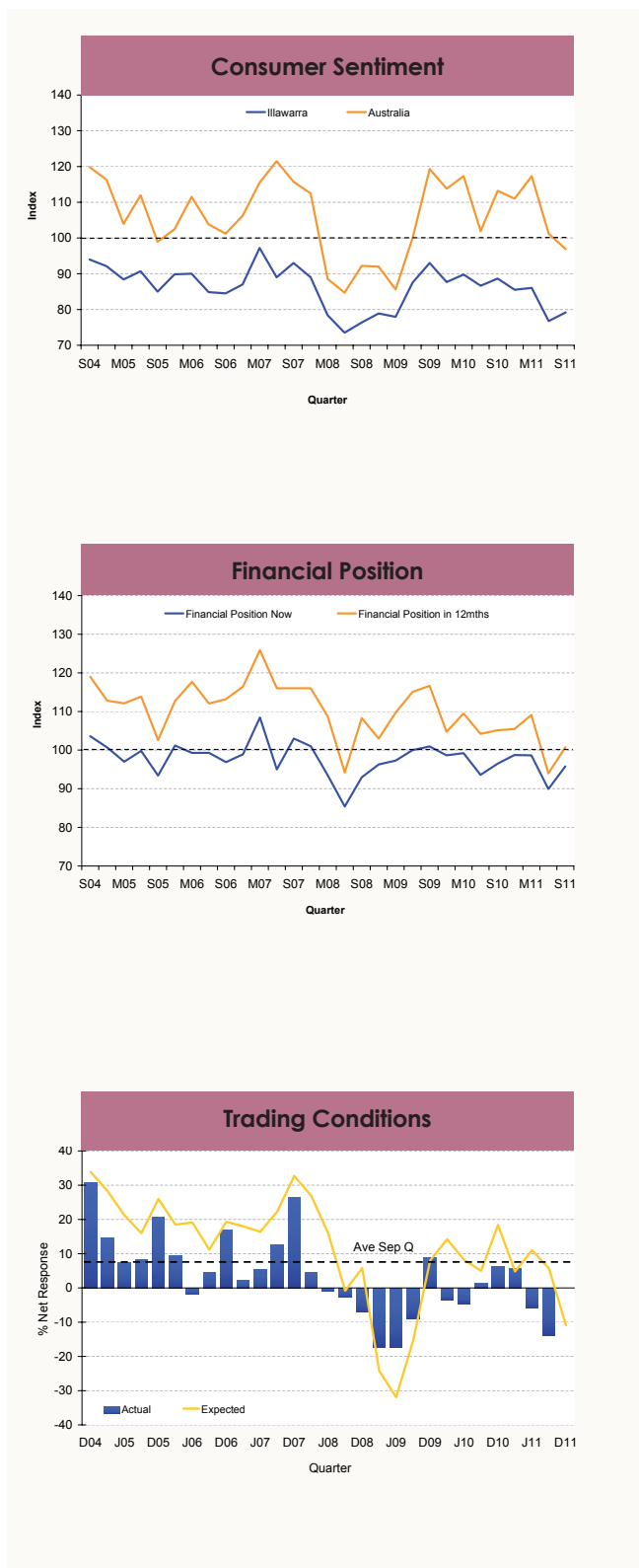
Consumer Sentiment & Business Conditions



Consumer Sentiment

The *IRIS Consumer Sentiment Monitor* showed that local consumer confidence grew slightly during the three months to September 2011:

- » The *Illawarra Consumer Sentiment Index* regained 2 pts to 79 pts overall. This is 10 pts below the long term September quarter average of 89 pts.
- » In contrast, there was a downturn for nationwide consumer confidence. Westpac's *Australian Consumer Sentiment Index* weakened by 4 pts to 97 pts. This result is below the long term September average of 108 pts.



Financial Position

The recent decision by several banks to cut fixed interest mortgage rates may have contributed to the improvement of the perceived financial position of Illawarra households during the September 2011 quarter:

- » The *Current Financial Position Index* increased 6 pts to 96 pts. This is 3 pts weaker than the long term September quarter average.
- » Confidence about the future financial situation of local households strengthened, as the *Future Financial Position Index* rose to 101 pts, up 7 pts from June.
- » The average level of the *Future Financial Position Index* during a September quarter is stronger at 112 pts.

Trading Conditions

Businesses reported that the downward trend seen over the year continued during the three months to September:

- » The *Trading Conditions Index* declined a further 8.1% pts to 14.0% in the three months to September 2011. This decrease brings the index 21.5% pts below the September quarter average.
- » Businesses expect to see a slight improvement for the next quarter. A net of 10.9% of Illawarra businesses anticipate a deterioration in trade activity, 3.1% pts stronger than the current quarter.

Labour Market



Labour Market Statistics

The employment situation in the Illawarra strengthened through the twelve months to June 2011:

- » The average number of persons employed reached 192,800, which is an increase of 7.5% compared to the year to June 2010. This means there are 13,500 more Illawarra residents employed.
- » The average yearly unemployment rate was 6.6%, while youth unemployment worsened to an average of 15.1% for the year, up from 14.8%.
- » An average of 6,473 people received unemployment benefits, which is a 20.6% drop from 8,154 in the year to June 2010.
- » The average yearly labour force participation rate grew to 57.3%, up 2.7% pts from 54.7%.

The quarterly results are strong despite a decline since September:

- » Average quarterly employment rose 1.5% to 196,400 persons, while the average participation rate grew 0.3% pts to 57.8%.
- » The quarterly unemployment rate fell to 6.1%, an improvement from 6.8% in the three months to March. However, the youth unemployment rate increased by 1.4% pts to 16.7%.
- » There was an 8.3% fall in the average number of unemployment benefit recipients to 6,130.

Job Advertisements

There was a slight improvement in the volume of local job advertisements published in the Illawarra Mercury over the year to June 2011:

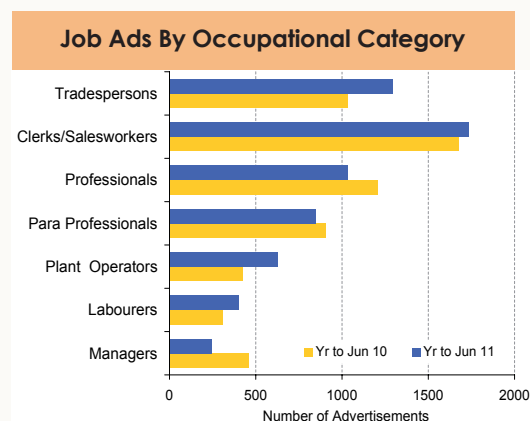
- » The total volume of positions advertised grew by 3.3% to 6,284. Full time job ads declined by 18.8% to 3,895. Ads for part time positions rose 88.4% to 2,383 from a low base in the year to June 2010.
- » There was strong growth in the number of positions advertised for plant operators (up 46.8% to 627).
- » There were also rises in the number of ads for tradespersons (up 24.8% to 1,294), for labourers (up 29.8% to 405) and for clerks/salesworkers (up 3.2% to 1,734).
- » In contrast, advertisements for managers decreased by 46.6% to 246, professionals decreased by 14.3% to 1,035 and ads for para professionals were down 6.5% to 849.

There was a different story for the June quarter:

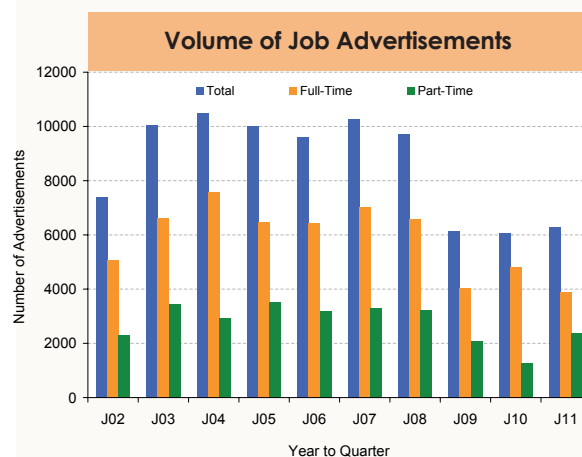
- » The total number of job advertisements weakened by 10.6% to 1,603, with 1,086 advertisements for full time jobs (up 6.2%) and 483 ads for part time jobs (down 40.1%).

	Yr to J10 (Ave.)	Yr to J11 (Ave.)
ISD Labour Market Statistics		
Employment (000's)	179.2	192.8
Unemployment Rate (%)	6.7	6.6
Participation Rate (%)	54.7	57.3
Youth Unemployment Rate (%)	14.8	15.1
Unemp. Benefit Recipients (No.)	8154	6473

Source: ABS Labour Force Survey



Source: IRIS Job Advertisement Series



Source: IRIS Illawarra Mercury Job Advertisements Series

Property



Property Market (WSD)

Median property prices across the Wollongong Statistical District (WSD) increased while there were less sales during the year to June 2011:

- » The median house price grew 4.5% to \$437,000, while the volume of sales fell to 3,206 (down 9.7%).
- » Medium density property sales weakened by 22.5% to 1,388. The median price for units climbed 2.2% to \$341,500.
- » The median price of land lots sales strengthened by 11.0% to \$275,000, but there were 411 land lot sales, down 21.9%.

There were mixed results for the three months to June:

- » The WSD's median house price fell to \$442,500 (down 2.2%), while there was a 1.2% drop in sales to 764. At the same time, there were 350 unit sales (up 16.3%) with the median price falling 10.6% to \$330,000. The median price paid for land improved by 12.3% to \$297,500.
- » The median house price declined in Wollongong LGA (down 3.5% to \$450,500), but increased in Shellharbour LGA (up 3.0% to \$392,500) and Kiama LGA (up 0.6% to \$535,000).
- » There were stronger medium density sales, with volumes up by 6.9% in Wollongong LGA to 264, up by 75.0% in Shellharbour to 63 and up by 27.8% in Kiama LGA to 23. Shellharbour also recorded a stronger median (\$335,000, up 9.1%). Wollongong and Kiama had weaker median unit prices, with \$325,000 and \$375,000, respectively.
- » Wollongong's median land price dropped 16.1% to \$247,500, however Shellharbour's median rose 25.5% to \$320,000 and Kiama's grew 6.6% to \$290,000.

Rental Market

The Wollongong SD rental market tightened over the year to June 2011:

- » The average weekly number of rental listings decreased by 24.2% for houses to 25 and by 27.1% for units to 51 per week.
- » The median advertised rental price for houses increased by 8.3% to \$390 per week and the median price for flats and units grew 7.1% to \$300 per week.

The average number of rental listings increased during the June quarter:

- » There was an average of 54 units listed per week, up 20.0% and there was a 12.0% rise in the number of houses listed for rent each week, with an average of 28.
- » The median rental price for houses in the WSD decreased to \$380 per week (down 2.6%). The median weekly rental price for units recorded no change at \$300.

MEDIAN PROPERTY VALUES	Year to Jun 10 (\$)	Year to Jun 11 (\$)	Yearly Change (%)
HOUSES			
Wollongong Statistical District	418,000	437,000	4.5
Wollongong LGA	419,125	450,000	7.4
Shellharbour LGA	372,500	376,000	0.9
Kiama LGA	530,000	545,000	2.8
UNITS/TOWNHOUSES			
Wollongong Statistical District	334,000	341,500	2.2
Wollongong LGA	338,000	349,000	3.3
Shellharbour LGA	290,000	300,000	3.4
Kiama LGA	375,000	378,000	0.8
LAND			
Wollongong Statistical District	247,750	275,000	11.0
Wollongong LGA	270,000	270,000	0.0
Shellharbour LGA	230,000	270,000	17.4
Kiama LGA	261,000	289,000	10.7

Source: IRIS/Valuer General's Land and Housing Database

RENTAL MARKET VALUES	Year to Jun 10 (\$)	Year to Jun 11 (\$)	Yearly Change (%)
HOUSES			
Median Weekly Rental (\$)	360	390	8.3
Average Weekly Listings (No.)	33	25	-24.2
UNITS - 1 Bedroom			
Median Weekly Rental (\$)	180	200	11.1
Average Weekly Listings (No.)	11	8	-27.3
UNITS - 2 Bedroom			
Median Weekly Rental (\$)	275	300	9.1
Average Weekly Listings (No.)	38	27	-28.9
UNITS - Total			
Median Weekly Rental (\$)	280	300	7.1
Average Weekly Listings (No.)	70	51	-27.1

Source: Derived from the 'To Let' Section of Saturday Edition of the Illawarra Mercury

Building Approvals



Dwelling Approvals

The number of residential building approvals for the year to June throughout the Illawarra Statistical District (ISD) dwindled:

- » House approvals fell 8.0% to 1,110 and medium density approvals declined to 568, down 11.7%. Total dwelling approvals decreased by 9.3% from 1,850 in the previous year to 1,678.
- » Dwelling approvals across the Wollongong SD fell by 29.9% to 754, with 474 in Wollongong LGA (down 31.2%), 241 in Shellharbour LGA (down 30.3%) and 39 in Kiama LGA (down 2.5%).
- » There were increases for Shoalhaven LGA (up 19.1% to 748) and Wingecarribee (up 19.7% to 176).

The results for the June 2011 quarter were:

- » Dwelling approvals in the Illawarra decreased by 12.0% to 337 (down from 383).
- » House approvals recorded a minor increase to 286 (up 1.4%), while unit approvals decreased by a further 49.5% to 51.
- » Kiama LGA experienced an 85.7% decline in approvals to 2, Wollongong LGA recorded 128 dwelling approvals (down 9.2%) and the Shoalhaven LGA recorded a 17.3% decrease with 110 approvals. There was an 11.8% fall for Wingecarribee LGA to 30 approvals.
- » However, residential buildings approvals in Shellharbour LGA grew by 9.8% from 61 in the March 2011 quarter to 67 in the current quarter.

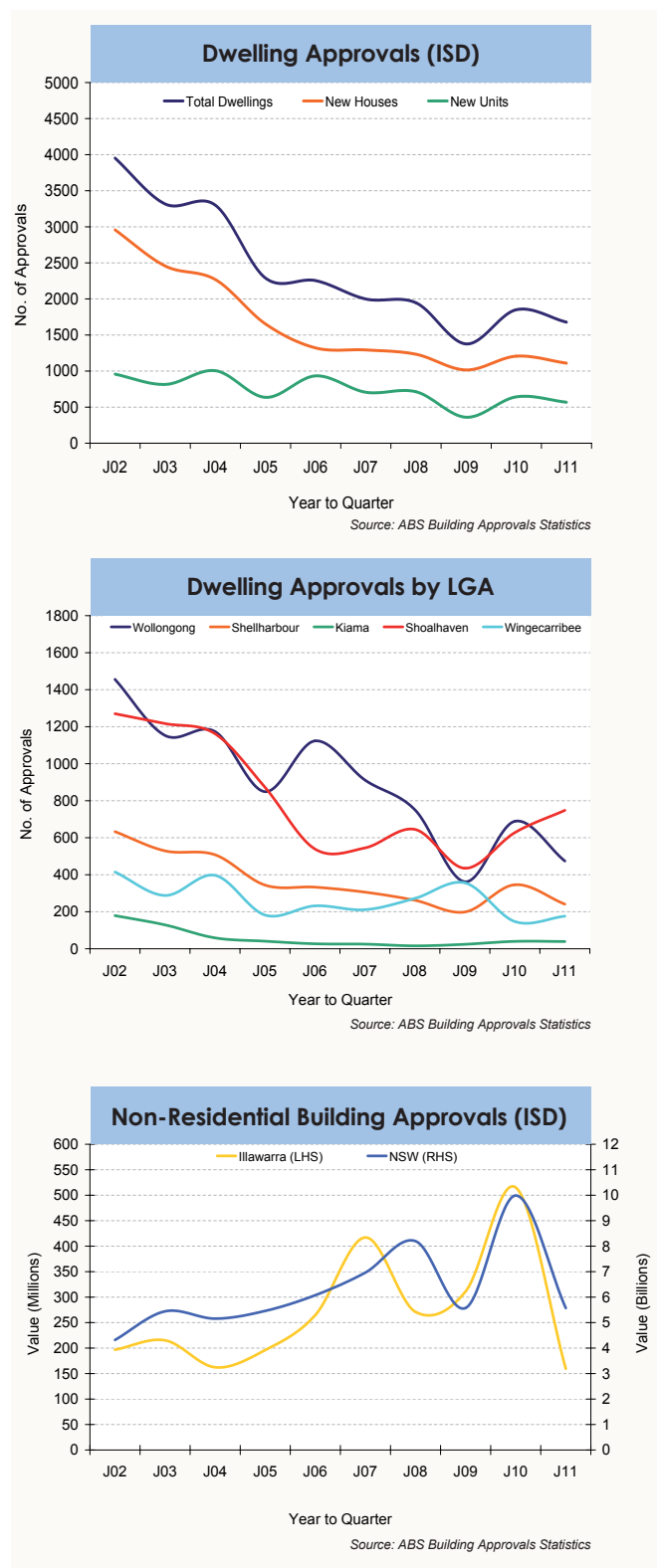
Non-Residential Building Approvals

Across the Illawarra, the total value of non-residential construction approvals weakened during the twelve months to June:

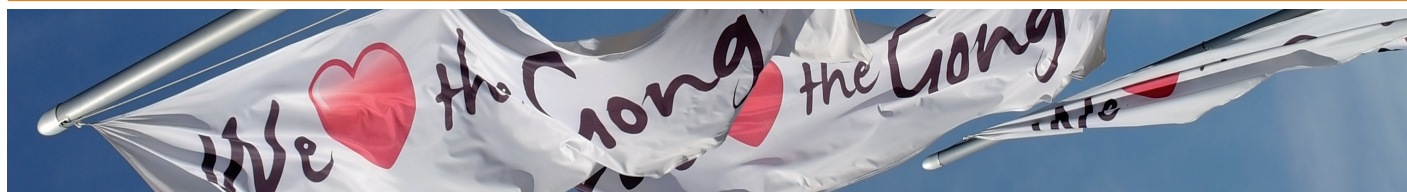
- » There was a 69.1% decline in the value of non-residential building approvals in the ISD to \$159.4 Million.
- » Private investment deteriorated by 40.5% to \$117.1 Million, while public investment fell 86.7% to \$42.3 Million.
- » Comparatively, NSW recorded \$5.6 Billion worth of approvals, a decline of 44.2%.

For the three months to June:

- » In the Illawarra, public approvals dropped to \$4.7 Million (down 65.6%). However, private approvals improved by 61.1%, leading the value of non-residential approvals to rise 6.1% to \$33.2 Million.
- » Conversely, approvals across NSW were valued at \$1.2 Billion, which equates to a 25.1% decline since the March quarter.



Tourism



Tourism Activity (WSD)

Tourism NSW figures reveal that the number of visitors to the Wollongong Statistical District increased during the year to June 2011:

- » The number of international visitors grew 21.0% to 61,700, the number of domestic overnight visitors increased by 7.5% to 875,000 and there were 3.0 Million domestic daytrippers to the region.
- » International overnight visitors spent 1.8 Million nights in the WSD, a 15.1% increase compared to the previous year. This represents a market share of 16.9% of nights spent in regional NSW.
- » The WSD receiving 9.6% of all regional NSW daytrips (up 0.4% pts on the previous year). 'Holiday or leisure' was the largest purpose for visitors to the region, cited by 54.0% of daytrippers.
- » There was a 1.4% decline in the number of domestic overnight visitor nights to 2.2 Million. The WSD received 3.8% of nights in regional NSW. 'Visiting friends or relatives' (40.6%) was the most common purpose among domestic overnight visitors, followed by 'holiday or leisure' (39.4%).

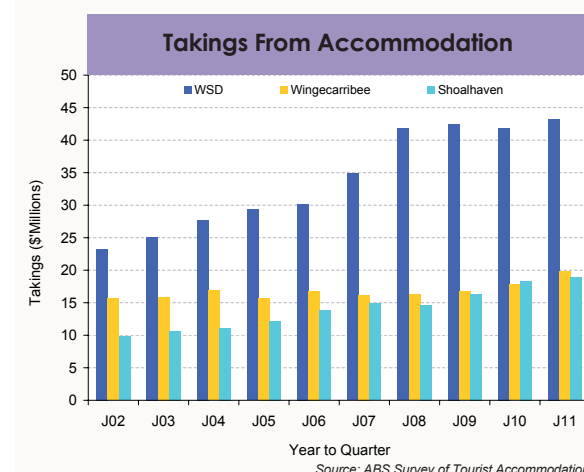
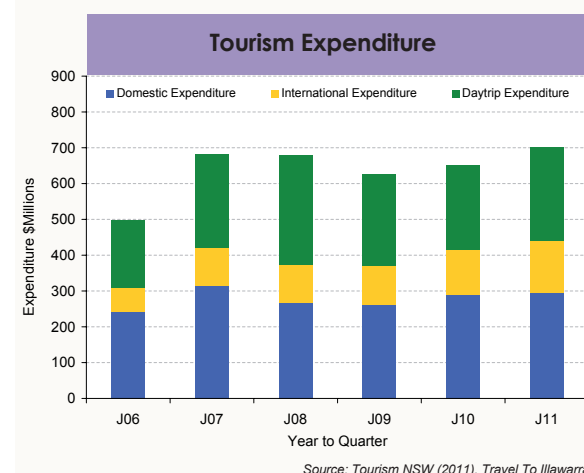
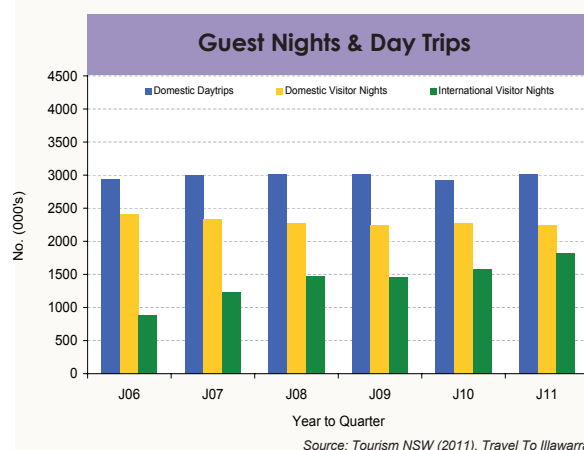
Total tourist expenditure in the Wollongong Statistical District increased by 7.7% to \$701.1 Million, up from the \$651.2 Million recorded in the year to June 2010:

- » International overnight visitors spent an average of \$81 per night (up 2.5%) and overall expenditure grew to \$147.6 Million (up 18.0%).
- » Domestic overnight travellers spent \$131 per night, on average. Total expenditure by these visitors was \$293.7 Million, an increase of 1.7% since the year to June 2010.
- » On average, domestic daytrip visitors spent \$86 per trip, up 6.2%. This resulted in a 9.5% strengthening of total expenditure to \$259.8 Million.

Accommodation Takings (ISD)

There was an increase in accommodation revenue for tourist establishments in the Illawarra SD during the year to June 2011:

- » Takings in the Illawarra improved by 5.1% to \$82.0 Million, while Wollongong SD takings grew 3.4% to \$43.3 Million. Meanwhile, across NSW, accommodation takings strengthened by 8.3%.
- » Accommodation revenue in Wollongong LGA increased by 2.3% to \$31.5 Million, takings in the Shoalhaven LGA recorded a 3.2% increase to \$18.9 Million and in the Wingecarribee LGA takings grew 10.9% to \$19.8 Million.
- » For the June quarter, there was a rise in takings from ISD accommodation establishments to \$19.2 Million, a 5.5% decrease compared to the June 2010 quarter.





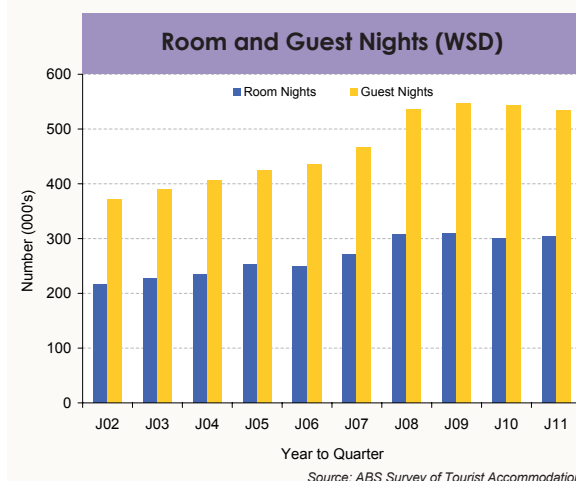
Wollongong Statistical District

The Wollongong Statistical District accommodation industry held its ground during the year to June 2011:

- » Room nights increased marginally from 300,842 in the year to June 2010 to 303,642, up 0.9%.
- » The number of guest nights declined to 534,551, which equates to a slight fall of 1.4%.

When comparing the current quarter with the June 2010 quarter, the WSD figures show deterioration:

- » Room nights were 0.2% weaker at 69,465.
- » There was a 1.1% fall in guest nights to 115,879, despite guest arrivals shrinking by 10.5% over the same period.



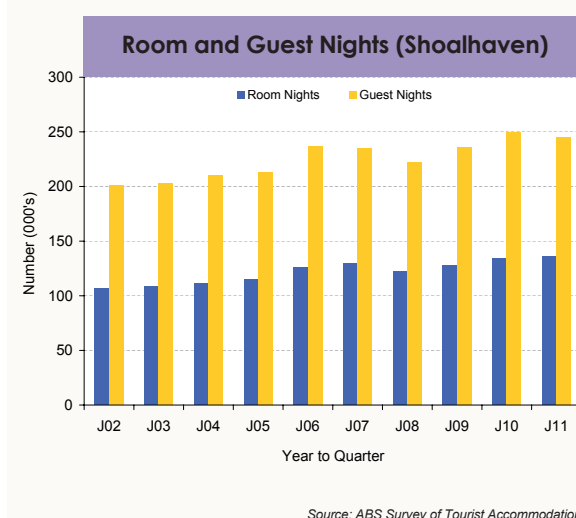
Shoalhaven

There were mixed tourism sector results for the Shoalhaven LGA for the twelve months to June:

- » The number of room nights grew to 136,314 (up 1.4%) compared to the twelve months to June 2010.
- » Guest nights weakened by 1.9% to 244,915 nights (a reduction of 4,832 nights).

There were similar results for the June quarter:

- » Total room nights for the quarter increased by 3.3% to 30,985 nights.
- » Guest nights slipped from 54,393 to 53,022, down 2.5% since the June 2010 quarter.



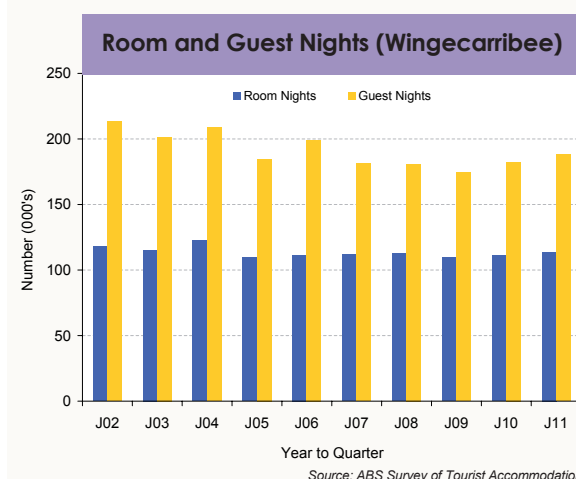
Wingecaribee

During the year to June 2011, the tourist accommodation industry in the Wingecaribee LGA progressed further:

- » There were 113,715 room nights, which was a 2.5% improvement from 110,927.
- » Guest nights increased to 188,082, up 3.1% from 182,502.

Looking at the results for the June 2011 quarter, compared to the June 2010 quarter:

- » The number of room nights recorded no change, with 29,453.
- » There was a 3.3% rise in guest nights to 47,575, an additional 1,520 nights.



Investment



The following list represents the majority of large developments (\$1M and over) taking place in the region up to the date of publishing. Those developments that have been approved to be built are indicated by an 'A', a project which has been completed in the current quarter is indicated by a 'C' and those currently under construction or have had their construction certificates approved are indicated by a 'U/C'. (A full list of current and recently completed projects is available by contacting IRIS Research).

Infrastructure and Public Utilities

Organisation	Development	Status	Value
South Eastern Sydney - Illawarra Area Health Service	Wollongong - Psychiatric emergency care unit	U/C	\$5.5M
	Shellharbour - Shellharbour Hospital Renal Unit for Dialysis	U/C	\$4.5M
	Shellharbour - Child and Adolescent Inpatient Unit	U/C	\$4.4M
NSW Public Works	Shellharbour - Shellharbour Hospital Non Acute Mental Health Unit	U/C	\$4.8M
	Warilla - Warilla North Public School Remediation of Blocks DEFG&K	C	\$1.3M
	Shellharbour - TAFE Child Studies & Childcare Centre	C	\$5.1M
	Kiama - Kiama High School New Gymnasium	C	\$3.1M
	Wollongong - Wollongong Performing Arts New Performance Venue	C	\$3.5M
	Wollongong - TAFE Metal Fabrication Centre - ITC	C	\$2.1M
	Figtree - Figtree Public School - new library block	C	\$1.1M
	Wollongong - SES Headquarters Refit of 6 levels	C	\$1.3M
	Port Kembla - Illawarra Senior College New Materials Workshop	C	\$2.8M
The University Of Wollongong	P&DII Building	C	\$33.0M
	Enterprise 1 Building	C	\$31.3M
	Batemans Bay Extension	U/C	\$2.0M
Roads and Traffic Authority	Bega Bypass - Realignment of the Princes Hwy to bypass Bega	U/C	\$70.0M
	Picton Road - Road Safety Strategy - a range of projects to upgrade the 27kms of Picton Rd	U/C	\$47.3M
	Gerrigong Upgrade - Princess Hwy upgrade between Mount Pleasant and Toolijooa Rd	U/C	\$25.0M
	Victoria Creek - Upgrade of the Princess Hwy at Victoria Creek	U/C	\$45.0M
	Figtree - Major intersection improvements at Princes Highway	U/C	\$15.0M
	Foxground & Berry Bypass - Princess Hwy upgrade between Toolijooa Rd & Schofields Rd	U/C	\$9.5M
	Princes Hwy - Heavy vehicle rest areas at Jerrawangala, Dummets & Broulee Rd, Malabar Creek	U/C	\$8.7M
	South Nowra - Upgrade of the Princess Hwy from Kinghome St to Forest Rd	A	\$62.0M
	Queanbeyan - Noise abatement for residents on the north & south sides of Canberra Avenue	Lodged	\$5.5M
	Nangudga Lake Bridge - replacement & construction of new bridge	U/C	\$3.7M
Department of Housing	Mount Warrigal - 12 dwellings - general housing	C	\$4.0M
	Barrack Heights - 12 dwellings - affordable rental accommodation (78-82 The Kingsway)	C	\$3.6M
	Tarrawanna - 13 dwellings (8-12 Henry Street)	U/C	\$3.3M
	Towradgi - 17 dwellings - seniors housing	U/C	\$4.5M

Industrial and Commercial

Area	Development	Status	Value
Wollongong LGA	Avondale - Demolition of existing structures, construction of 18 hole championship golf course	A	\$27.5M
	Bulli - Demolition of existing structures and construction of retail development	A	\$7.0M
	Haywards Bay - Hungry Jack's Restaurant development	A	\$2.8M
	Mangerton - 2-storey extension to existing junior school (6 classrooms over a multi-purpose hall)	C	\$3.3M
	Stanwell Tops - Refurbishment, new accommodation, swimming pool at the Tops Conference Centre	U/C	\$2.1M
	Unanderra - Alterations & additions - installation of pilot plant for processing CRT glass Modification	U/C	\$13.0M
	Warrawong - Internal refurbishment of cinema foyers, concessions areas and cinemas	C	\$2.0M
Shellharbour LGA	Albion Park Rail - Refurbishment of existing Club and outdoor dining area	U/C	\$2.0M
	Albion Park - Demolish existing structures and construct KFC Restaurant with drive thru lane	U/C	\$4.0M
	Albion Park - Stage 1 Earthworks and Riparian Corridor Works	U/C	\$2.0M
	Shellharbour - Alterations and additions to Shellharbour Workers Club	A	\$3.0M
	Shellharbour - Wetlands 3 & 5 and associated landscaping	Lodged	\$6.0M
Kiama LGA	Kiama - Printery, office and car parking	A	\$2.0M
Shoalhaven LGA	Bomaderry - School Gymnasium	A	\$2.6M
	Bomaderry - Packaging plant	U/C	\$1.4M
	Culburra Beach - Internal fitout for new supermarket	A	\$1.8M
	Culburra Beach - Staged development for 18 hole golf course with carpark	U/C	\$1.0M
	South Nowra - New Motor Showroom, servicing & parts centre	A	\$1.1M
	Ulladulla - Aquaculture facility	U/C	\$4.9M
Wingecarribee LGA	Robertson - Sewerage treatment plant	A	\$17.5M
	Sutton Forest - Refurbishment of hotel and motel units	A	\$10.0M
	Mittagong - Water Reservoir	A	\$4.3M

Residential

Area	Development	Status	Value
Wollongong LGA	Austinmer - Demolition, alterations & additions to existing dwelling house	Lodged	\$2.2M
	Corrimal - Demolition of Leagues Club & construction of 60 residential units & 6 villa homes	A	\$12.1M
	Corrimal - Demolition & construction of 20 home units & 5 shops with 3 levels of parking	U/C	\$2.4M
	Horsley - Demolition & construction of 290 lot residential subdivision	A	\$6.8M
	Wollongong - mixed use development of 2x9 and 2x8 level buildings	A	\$38.1M
	Wollongong - Demolition & construction of residential apartment bldg (6x1 , 26x2 & 2x3 bed apartments)	A	\$6.0M
Shellharbour LGA	Shell Cove - Subdivision to create 71 residential, 4 super & 3 public reserve lots	Lodged	\$7.5M
	Warilla/Barrack Heights - Demolishing & constructing infrastructure works, 52 villas with garages	Lodged	\$10.6M
	Albion Park - 4 townhouses and 6 villas with garages & strata subdivision	U/C	\$1.5M
	Flinders - 12 townhouses with garages	A	\$1.5M
	Albion Park Rail - Demolish existing structures and construct 4 townhouses and 4 villas	A	\$1.6M
Kiama LGA	Kiama - Demolition of existing motel and construction of 9 residential units and 2 serviced apartments	A	\$2.9M
	Kiama - Seniors living development - 52 villas, community facility and carparking	A	\$2.8M
Shoalhaven LGA	Milton - Masterplan for seniors living development	A	\$93.0M
	St George's Basin - Retirement village	A	\$21.0M
Wingecarribee LGA	Burradoo - Seniors Living 53 dwellings	U/C	\$13.0M

About IRIS

Profile Illawarra

Profile Illawarra is a quarterly economic review of the Illawarra region providing an up to date summary of economic performance and development in the region.

Real Estate Report

A quarterly report on market activity in the Wollongong, Shellharbour, Kiama, Shoalhaven and Wingecarribee areas.

Consumer Sentiment Monitor

A quarterly update of consumer sentiment and spending patterns in the Illawarra Region.

Illawarra Business Survey

A quarterly report on performance and expectations of local business for the coming quarter. Analysis is presented by organisational size and industry.

Statistical Guide to the Illawarra

Updated annually, this is an easy to use, pocket sized pamphlet that covers a wide variety of interesting data.



When we commenced operations in 1980, IRIS was Australia's first computer based information service. Since that time we have developed a number of sophisticated research techniques and services that permit us to provide the highest level of information quality and research to business, government and community organisations. Our diverse range of research capabilities and specialisations include:

Capabilities

- » Computer aided telephone interviewing incorporating audio facilities
- » Web/online surveys
- » Household interviewing
- » Mall intercepts
- » Audits and observational studies including mystery shopping
- » Data mining
- » Statistical/multivariate analysis and modelling
- » Focus groups
- » Workshop facilitation

Specialisations

- » Community usage and attitudes
- » Customer satisfaction
- » Advertising and brand tracking
- » Local government
- » Corporate image and identity studies
- » Finance and banking
- » Media
- » Business to business
- » Staff opinion surveys
- » Public opinion polling
- » Tourism
- » Health and medical
- » Service and program evaluation

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Report Notes

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